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INGENEUS

Impact of Networks, Globalisation and their Interaction with EU Strategies

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Introduction

The INGINEUS survey was run from November 2009 (month 9) to June 2010 (month 18) in nine countries, namely, Brazil, China, Denmark, Germany, India, Italy, Norway, South Africa and Sweden. It was carried out in five languages (English, Portuguese, Danish, German and Italian).

Three sectors were targeted: ICT, automotive, and agro-processing. These sectors have been chosen as they represent a range from high tech industry (ICT) to progressively lower tech industry (agro-processing).

Here below, Table 1 summarises the sector coverage of the INGINEUS survey by country and relatively partner institution.

Table 1: Sector coverage and partners involved

AUTOMOTIVE	partner	country
	DIE	Germany
	ULUND	Sweden
	FUNDEP	Brazil
	LdA	Italy
	GIBS(UP)	South Africa
ICT	partner	country
	NIFU STEP	Norway
	ULUND	Sweden
	GUCAS	China
	IBS	Estonia
	CDS	India
AGRO	partner	country
	CBS	Denmark
	GIBS(UP)	South Africa

For each sector, a sector leader was appointed to help define the scope/breadth of the sectors to be surveyed. Each sector leader was assisted by a member of the Executive Committee, as follows:

- **Automotive sector:** Eike W. Schamp (DIE) and Jo Lorentzen (HSRC and member of the Executive Committee)
- **ICT sector:** Balaji Parthasarathy (IIIT-B) and Cristina Chaminade (ULUND and member of the Executive Committee)
- **Agro-processing sector:** Stine Haakonsson (CBS) and Helena Barnard and Tashmia Ismail (UP(GIBS) and members of the Executive Committee)

Before the launch of the survey, processing the INGINEUS questionnaire required survey partner institutions, WP leaders, sector leaders and the members of the Executive Committee to undertake the following steps:



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1. In preparation of the Workshop on Methodology (1-5/03/2009, Johannesburg, South Africa, month 3), UP(GIBS) requested that each WP leader should have elaborated the **top three questions** to include in the questionnaire and essential control questions (size etc.) of value;
2. At the Workshop on Methodology, UP(GIBS) circulated a **document aggregating the survey questions into a preliminary draft** form across the work packages;
3. From April 2009 (month 4) to May 2009 (month 5), final decisions needed to be made on the **survey design and process**. The questionnaire was jointly revised by WP leaders, sector leaders and the Executive Committee. Each survey partner institution selected a representative database from the relevant industry within their country;
4. In May 2009 (month 5) WP leaders approved the **first definitive version of the questionnaire**, which would have been launched on a sample of pilot companies in the following months;
5. From June 2009 (month 6) and August 2009 (month 8), the questionnaires received feedbacks from the Executive Committee and sector leaders. At the same time, instructions were provided to all ten countries conducting surveys on how to set up the online survey tool through **Survey Monkey**. The surveys would have then been conducted using the Survey Monkey online tool in Denmark, India, Norway, South Africa and Sweden and/or via face –to-face and telephone interviews in Brazil, China and India. Those countries that would have run the survey not through Survey Monkey were required anyway to report the results on the survey editor. In this way the survey progress could be monitored from a central site;
6. In September 2009 (month 9) survey partners were required to: **(i)** get comfortable with the online survey editor Survey Monkey, **(ii)** send pilot requests to their company contacts, **(iii)** prepare a final distribution list, **(iv)** create a letter to mail to company distribution list from Survey Monkey;
7. From October 2009 (month 10) to November 2009 (month 11), **survey partners provided to UP(GIBS) feedbacks from pilot companies**. According to them, the Executive Committee elaborated the **definite version of the questionnaire**. Before the final launch of the questionnaire (16 November 2009), survey partners sent e-mail alerts to the sample of firms to expect the questionnaire and for permission.

A total of 1192 responses were received from all respondents across the survey project. The survey consisted of fourteen questions. The initial questions were designed to illicit background and demographic information from the firms, the second section of the questionnaire aimed to establish the regional focus, innovative capabilities and offshoring behaviour of firms whilst the final section dealt with policy issues and the financial crisis.

In what follows, **Section I** (Interview protocol) and **Section II** (Database design) provide the final elaborated tools before the launch of the INGINEUS survey.

Section III (Templates and guidelines) gathers instructions elaborated for survey partners to ensure the greatest effort in conducting the survey.

Finally, **section IV** presents all the information that was required by survey partners to elaborate the integrated analysis and descriptive statistics of the survey results.



1. Interview protocol

1.1. Introductory letter



Impact of Networks, Globalisation and their Interaction with EU Strategies

INGINEUS is an international research project funded by the European Commission that studies global innovation networks. It involves 14 research institutes and universities in seven European countries plus Brazil, China, India and South Africa. For further information on the INGINEUS project please see www.ingineus.eu.

In [country] the [Institute] is responsible for undertaking the survey on behalf of the research consortium INGINEUS.

The [Institute] (see [web site]) is fully responsible for the protection of your data. Your responses are treated with full confidentiality. Results are summarised in spreadsheets together with information collected from other enterprises in the sample. Data protection is fully guaranteed.

Contacts for survey queries

If you have any questions to the survey, please contact the following persons:

[Please insert your contact details]

[Name and surname]: [email address]

[full postal address]

[phone number]

For more information on INGINEUS, please visit our web site at www.inginues.eu.



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1.2. INGINEUS questionnaire

- Answer by placing a cross in the relevant box, except where a written comment is needed
- Answer for your specific enterprise, e.g. stand-alone firm or specific subsidiary
- Answer all questions as they relate to your enterprise in 2008
- Where data for three previous years are requested, include 2006, 2007 and 2008
- The abbreviation 'MNC' is used for 'multi-national corporation' throughout the survey

1. Please briefly describe your enterprise's main product (goods or services)

1.1	Agro-processing	
1.2	ICT	
1.3	Automotive	

1.1. Main areas of focus (agro-processing)

101	Processing and preserving of meat and production of meat products	
102	Processing and preserving of fish, crustaceans and molluscs	
103	Processing and preserving of fruit and vegetables	
104	Manufacture of vegetable and animal oils and fats	
105	Manufacture of dairy products	
106	Manufacture of grain mill products, starches and starch products	
107	Manufacture of bakery and farinaceous products	
108	Manufacture of other food products	
109	Manufacture of prepared animal feeds	

1.2. Main areas of focus (ICT)

26:30:00	Manufacture of communication equipment	
62:01:00	Computer programming activities (This class includes the writing, modifying, testing and supporting of software)	
62:02:00	Computer consultancy activities	
62:03:00	Computer facilities management activities	
62:09:00	Other information technology and computer service activities	

1.3. Main areas of focus (automotive)

25241	Manufacture of technical parts and accessories of plastic	
28408	Pressing, stamping and roll forming	
2914	Manufacture of bearings, gears, gearing and driving elements	



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3161	Manufacture of electrical equipment for engines and vehicles	
343	Manufacture of parts and accessories for motor vehicles and their engines	
74205	Engineering activities for projects in specific technical fields	
	Others	

Others (please indicate)

--

2. Are you:

2.1	A standalone company?	
2.2	A subsidiary of an MNC?	
2.3	The headquarters of an MNC?	

3.1. How many full-time equivalent (FTE) employees does your enterprise have?

3.1	Fewer than 10 FTE employees	
3.2	10 to 49 employees	
3.3	50 to 249 employees	
3.4	250 to 999 employees	
3.5	1000 or more employees	

3.2. Does your enterprise have a significant share of sales activity abroad?

YES		
NO		

3.2.1. If you answered 'Yes' to the question above then please provide the percentage (%) of total sales derived from export.

%	
---	--

3.3. Do you have significant R&D activity?

YES		
NO		

3.3.1. If you answered 'Yes' to the above then please estimate the number of full time equivalents employed in R&D.

--

4. In geographical terms, is your enterprise's largest market?

4.1	Internal to your enterprise	
4.2	A regional market (local region in your country)	



DELIVERABLE 2.1: Original tool kit

4.3	Domestic market (rest of the country)	
4.4	An export market	

5. If an export market (4.4) was selected then please indicate the 3 most important destinations in terms of sales.

5.1	North America	
5.2	South America	
5.3	Western Europe	
5.4	Central and Eastern Europe	
5.5	Africa	
5.6	Japan & Australasia	
5.7	Rest of Asia	
5.8	The rest of the world (developing)	

6. Which is the most important source of technology for your enterprise (including hardware, software and knowledge)?

6.1	We produce most technological inputs in-house	
6.2	We buy most of our inputs from other branches of our own MNC	
6.3	We buy most of our technological inputs from non-MNC firms	
6.4	We buy most of our inputs from MNCs with which we are not formally connected	
6.5	We buy most of our inputs from public-sector organisations, e.g. research institutes, universities etc	

7. Please indicate if your enterprise experienced innovation in the past 3 years (2006-2008) in any of the following. You may tick more than one option.

		New to the world	New to the industry	New to the firm	None
7.1	New products				
7.2	New services				
7.3	New or significantly improved methods of manufacturing or producing				
7.4	New or significantly improved logistics, distribution or delivery methods for your inputs, goods and services				
7.5	New or significantly improved supporting activities for your processes (e.g. purchasing, accounting, maintenance systems etc.)				



DELIVERABLE 2.1: Original tool kit

8. Regarding the development of the most important innovation of your firm in the last 3 years: who did you actively collaborate with and in which geographical location? Region refers to a sub national area, please select all that apply.

		Your Region	Your Country	North America	South America	Western Europe	Central & Eastern Europe	Africa	Japan & Australasia	Rest of Asia
8.1	Clients									
8.2	Suppliers									
8.3	Competitors									
8.4	Consultancy companies									
8.5	Government									
8.6	Local Universities/Research Institutions/Labs									
8.7	Foreign Universities/Research Institutions/Labs									
8.8	Other									

Other (please specify)

--



DELIVERABLE 2.1: Original tool kit

9. Has your enterprise developed formal/informal linkages (e.g. research relationships) with the following kinds of foreign organizations? (*Informal* implies no written contract or financial obligation exists)

Please tick all relevant boxes.

		Yes, formal	Yes, informal	No
9.1	Clients			
9.2	Suppliers			
9.3	Competitors			
9.4	Consultancy companies			
9.5	Government			
9.6	Foreign universities/research institutions/labs			
9.7	Other			

Other (please specify)

--

- 9.1. Regarding internationalisation, does your firm offshore (or has your firm offshored) production or any R&D activities? (*Offshoring* encompasses activities both internal and external to the firm for the purposes of serving home country or global markets in a location outside the enterprise's home country)

YES		
NO		



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9.2. Complete only if 'Yes' selected in Question 9.1 above.

What were the important regional factors in the decision to offshore your enterprise's production and/or R&D innovation activities into a host region(s)? Mark all important factors.

		Offshoring of production	Offshoring of innovation
9.2.1	Availability of specialised knowledge in the host region		
9.2.2	Availability of qualified human capital at a lower cost than in your own country		
9.2.3	Access to knowledge infrastructure and services in the host region (R&D infrastructure, technical support services etc.)		
9.2.4	Access to other infrastructure, cheaper production resources and services (land, inputs or unskilled labour, ICT, electricity, roads, airports, ports etc.)		
9.2.5	Opportunity to sell existing products and achieve greater access into new markets		
9.2.6	Incentives for the location of activities in the host region (e.g. favourable regulations, special tax regimes, testing facilities and trials etc.)		
9.2.7	Efficient financial markets (including Venture Capital)		
9.2.8	The level of ethical standards and trust		
9.2.9	The enforcement of intellectual property rights		
9.2.10	Following clients who are outsourcing i.e. 'follow sourcing'		
9.2.11	Other, please specify below		

Other (please specify)

--



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10. Please indicate how the following functions are performed by your enterprise, including different subsidiaries of the same firm.

		By your unit in your location	At subsidiaries of firm in a developed location(s)	At subsidiaries of firm in a developing location(s)	Outsourced to a partner in your country	Outsourced to a partner outside your country in a developed location	Outsourced to a partner outside your country in a developing location
10.1	Strategic Management						
10.2	Product development (research, design and engineering)						
10.3	Marketing, sales and account management						
10.4	Operations (manufacturing, service supply)						
10.5	Procurement, logistics, distribution (obtaining, storing and transporting inputs and outputs)						
10.6	Corporate governance (legal, finance, accounting, government relations)						
10.7	Human resource management						
10.8	Technology and process development (maintenance, redesign of equipment)						
10.9	Firm infrastructure (building and maintenance IT systems)						
10.10	Customers and after sales service						



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11. Indicate the extent to which the following factors represented a challenge or barrier when developing a new good or service in collaboration with firms, universities or other organisations located abroad?

Please note only one answer may be selected per row.

		Extreme Barrier	Serious Barrier	Moderate Barrier	Small Barrier	Not a barrier at all
11.1	Finding relevant new knowledge					
11.2	Overcoming organisational barriers and gaining management acceptance					
11.3	Changing the current location of operations and the associated cost thereof					
11.4	Managing globally dispersed projects and cultural differences					
11.5	Harmonising tools, structures and processes					

12. During the PAST three years, how did your enterprise experience the following factors in the internationalisation of your innovation activities?

		Highly Negative	Moderately Negative	Moderately Positive	Highly Positive	Factor Not Experienced
12.1	Practical support from centres for the internationalisation of innovation and technology transfer					
12.2	Public incentives and economic support					
12.3	The international exposure and contacts of universities, public research and administrative structures					
12.4	Relevant labour force training and skills					
12.5	The regulations, practice and jurisprudence around					



DELIVERABLE 2.1: Original tool kit

		Highly Negative	Moderately Negative	Moderately Positive	Highly Positive	Factor Not Experienced
	intellectual property rights					
12.6	The rules and practice regarding foreign direct investment and trade policy					
12.7	The rules and practice regarding migration policy regulations for employing foreign scientists/technicians/expert					
12.8	The availability of risk capital for innovation activities with an international dimension					
12.9	The corporate governance environment (rules concerning firm ownership, shareholder's rights, etc.)					

13. Considering your future innovation activities, please assess the need for improving the following factors:

		Very high need	Moderately high need	Moderately low need	Very low need	Factor not needed
13.1	Practical support from centres for the internationalisation of innovation and technology transfer					
13.2	More public incentives and economic support					
13.3	Better access to international research networks					
13.4	Higher skills in the labour force					
13.5	More stringent regulations, practice and jurisprudence around intellectual property rights					
13.6	Better and clearer rules regarding foreign direct investment and trade					
13.7	More open and flexible migration policy regulations for employing foreign scientists/technicians/experts					
13.8	Greater availability of risk capital for innovation activities with an international dimension					



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14. How have you reacted (or are planning to react) to the current global economic crisis?

14.1	Few or no changes	
14.2	Increasing efforts at innovation on your part	
14.3	A serious reduction of your innovative activities	
14.4	Relocation abroad of your innovative activities	
14.5	Relocation of innovative activities to you from abroad	

Contact information

Company	
Address	
Address 2	
City/town	
State	
ZIP/postal code	
Country	
Email address	
Phone number	



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2. Database design

After the elaboration of the ENGINEUS questionnaire, survey partners were required to set up their online survey tool through Survey Monkey and to translate the questionnaire itself.

In what follows we report all information concerning the survey editor and translations of the questionnaire provided to partners before the final launch of the survey.

2.1. Survey editor

2.1.1 Survey Monkey

The online survey editor of the ENGINEUS questionnaire is Survey Monkey (SM), www.surveymonkey.com. SM creates a common platform and format to allow us to capture all data in the same tables and to assimilate responses from all countries through the same system.

Instructions for all countries conducting the survey

Please follow carefully the steps indicated below, regardless of how you plan to administer the questionnaire: by phone, e-mail, face-to-face interviews. It is important to have a common platform and format. This will allow us to capture electronically all responses and to ensure that we keep track of the country responses in real time!

- Decide in which language you will conduct the survey
- Translate the English version of the questionnaire contained in the link below
- Set up your SM account on Survey Monkey (cost: \$20/month)
- Create your web-based survey site
- Decide on a list of pilot companies which will test drive the survey
- Your translated version of the questionnaire; the link to your web based survey site; your username and password on SM; your lists of pilot companies; must be kindly sent to Tashmia Ismail (UP(GIBS))

For an overview of questionnaire on Survey Monkey, please see **Annex I** to this deliverable.

2.2. Translations of the questionnaire

A standard document containing the English version of the questionnaire was provided to country partners to let them translate the questionnaire in the same format.

The questionnaire have been carried on in English language in India, South Africa, Sweden and UK and translated by the other partners as it follows (the translated versions of the questionnaire are attached in **Annex II**):



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Table 2: languages in which the questionnaire has been translated.

institution	country	language
CBS	Denmark	Danish
DIE	Germany	German
FUNDEP	Brazil	Portuguese
GUCAS	China	Chinese
All others	-	English



3. Templates and guidelines

In this Section are report the instructions elaborated to guide survey partners when launching to and conducting the survey.

3.1. Survey launch

- Remember to alert firms: call or mail the firm to introduce the survey and the fact that they will be receiving the survey link in a mail.
- Export your e-mail distribution list into SM: for those who send the survey out electronically, by exporting the distribution list into SM an e-mail would be sent to the firm with a survey link in the e-mail letter.
- Firms identification codes: the identification code for the firm can be typed in SM, it is contained in a column in the e-mail address line of each company.
- Introductory letter to explain the project to respondents: an example of a letter is provided in Annex III. Please feel free to cut and paste it into the SM distribution mail or create your own letter if you prefer.
- Incentive firms: a small reward has been included in the introductory letter in order to incentivise firms to respond. Please include this incentive in your country mail or explain it verbally if you are doing telephone or face-to-face surveys.
- In case of no response: those firms who do not respond within 3 to 4 weeks of receiving the mail should be called and sent the mail with the link again. Firms which complete and return the survey will be highlighted in SM.

3.2. Survey timeline

- **November 2009 – April 2010:** survey partners collect responses and follow up on incomplete or non-returned surveys.
- **May 2010:** survey partners clean data.
- **June 2010:** survey partners send cleaned data to Tashmia Ismail (UP(GIBS)).

3.3. How to increase the response rate

Here below we provide you with some suggestions to possibly increase the response rate in your country. Please follow them carefully.

- Use a shorter and more attractive **cover letter** for the survey (an example of cover letter is provided in **Annex III**).
- Ask for a **data base** to the statistical office of your country with all firms belonging to the sector of your interest.



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- **If contact details are missing**, you may look for them on internet: it's likely that you can end up directly with a personal email (e.g. of the CEO or of the manager director) and, if you don't, try to use the general e-mail (like, info@company.com). **When only general e-mail addresses are available**, include in the cover letter a line asking to provide you the e-mail address of the right person that could fill the questionnaire (even if, it's rare that you will be contacted, in some cases it can happen).
- Send the questionnaire to ALL the firms in the data base.
- If firms do not start the questionnaire, send a reminder (an example of **reminder for non-respondents** is provided in **Annex III**). If (after one week) you don't receive any feedback, send a second reminder to all the contacts that you have in that firm (not only to the one selected at the beginning).
- For those firms that did not complete the questionnaire, it's worthing sending a specific reminder (an example of **reminder for partial respondents** is provided in **Annex III**). If you don't receive any answer, phone the firm asking them if they need some help with some of the questions.
- Share with all partners conducting the survey your experience!

IMPORTANT!

Try to reach the maximum number of completed questionnaires by **31st March 2010**. The final target should be around 10% of our entire population of firms.



4. Summary reports

This Section presents all information that were required to report and tables to fill by survey partners in order to elaborate the integrated analysis and descriptive statistics.

4.1. Methodology reports

The official deadline for completion of the survey was **16th April 2010**.

To gather data from each country in exactly the same format, survey partners are kindly asked to follow the instructions provided below as to how to format, download, clean their data and to prepare the methodology report.

4.1.1 Instructions for downloading from Survey Monkey

- Go to the analyse results section
- Click on the option to download on the left hand side menu
- Download the **“Summary Report”** in Excel, CSV, HTML and PDF (download in all formats since statistician may have preferences!)

Download the “all responses collected”

- Columns: the condensed and expanded options
- Cells: actual choice text and Numerical Value (1-n)

4.1.2 What the methodology report should tell us

- Database(s) used (e.g. the Beijing Bureau of Commerce)
- Noteworthy observations about database(s) (e.g. commercially purchased, regionally focused)
- Region / national
- Initial data cleaning actions based on:
 - Minimum size (number of employees) of firms contacted from database
 - Size of initial and ultimate cleaned database
 - Job title contacted: (i) large-sized, (ii) medium-sized, or 3) small-sized organisations
 - Mode of contact (face to face visit, call, email, survey monkey)
 - Number of responses
 - Number of: (i) bounce backs / no contact possible, (ii) opt outs, (iii) no response
- Any relevant information on the sample

4.1.3 Controls

It is important to identify a strategy to ascertain whether companies which did not respond to the survey are or are not different to those which did respond (test for non response).



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Here below you will find three possible methods for doing this. Please let UP(GIBS) know how you are planning to test for non response:

1. Conduct a follow-up non-response survey. This entails calling about 5% of the companies that did not respond and asking them to answer a few carefully chosen questions from the survey. You should then compare the ones that have responded to the entire survey with the control groups to check if they are statistically and significantly different or not. This is the most rigorous technique, even if it is quite resource intensive.
2. Look at existing information in your database e.g. NACE code or size of firm and compare groups based on this classification.
3. Compare our survey responses to the responses of another survey already carried out in your country/region and with similar questions to your survey e.g. % of R&D personnel employed.

4.1.4 Deadline

Please provide the detailed methodology report and data to Tashmia Ismail (UP(GIBS)) by the **30th April 2010**. By **June 2010**, survey partners will receive the integrated analysis and descriptive statistics from UP(GIBS) for comments.



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Please complete a separate line for each database used.

Country: _____ Industry: _____

Database(s) used (e.g. the Beijing Bureau of Commerce)	Noteworthy observations about database(s) (e.g. commercially purchased, regionally focused)	Region / national	Initial data cleaning actions based on:	Minimum size (number of employees) of firms contacted from database	Size of 1) initial and 2) ultimate cleaned database	Job title contacted: 1. Large organisations 2. Medium-sized orgs 3. Small orgs	Mode of contact (face to face visit, call, email, surveymonkey)	Number of responses	Number of: 1. Bounce backs / no contact possible 2. Opt outs 3. No response

Validation process: (see INVENTED examples for TYPE OF information required)

Country: _____ Industry: _____

Database	Control dimension 1	Source of control dimension 1	Nature of bias	Extent of bias	Control dimension 2	Source of control dimension 2	Nature of bias	Extent of bias	Control dimension 3	Source of control dimension 3	Nature of bias	Extent of bias
Swedish statistical agency	Size of firms	Swedish CIS 2007	Ingineus has bigger sized firms	Statistically non-significant	R&D spending	Swedish CIS 2007	Ingineus has higher level of R&D	Statistically non-significant	Extent of innovation	Swedish CIS 2007	More new to the world innovative in Ingineus	Statistically marginally significant (P = 0.11)
Experian	Size of firms	Data contained in Experian database	None	None	Location of firms	Data contained in Experian database	Ingineus more concentrated in Jhb	Statistically significant (P = 0.05)				



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4.2. Descriptive analysis

4.2.1 Subsequent analysis

1. Get overall totals per country and industry
2. Validate results
 - Get totals for other surveys in on the topic (UNCTAD, KPMG, others?)
 - Non-response analysis:
 - a) Use CIS where possible
 - b) Use demographics contained in database
 - Document local caveats and insights; the emerging nature of the phenomenon
3. Provide a descriptive analysis of survey responses

Table 3: analysis per country & industry of # of responses for each question

ICT	Total responses	Response rate
EU countries		
Sweden		
Estonia		
Norway		
Developing countries		
China		
India		
TOTAL FOR ICT		
Automotive	Total responses	Response rate
EU countries		
Germany		
Sweden		
Italy		
Developing countries		
Brazil		
South Africa		
TOTAL FOR AUTOMOTIVE		
Agro-processing	Total responses	Response rate
EU countries		
Denmark		
Developing countries		
South Africa		
TOTAL FOR AGRO-PROCESSING		
TOTAL FOR DATABASE		

Table 4: summary of responses and response rates per country

ICT (and for each subsequent industry)	TOTAL	Q1	Q2	Q3	Q4	Qn
Sweden						
Estonia						
Etc						
TOTAL EU						
China						
India						
TOTAL developing countries						
TOTAL						



DELIVERABLE 2.1: Original tool kit

5. ANNEX I: The questionnaire on Survey Monkey

In the following pages we provide the graphical version of the questionnaire as it displayed on Survey Monkey.

Seleziona una pagina per visualizzare il seguito o tutte le pagine:

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Background Information

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INGINEUS is an international research project funded by the European Union that studies global innovation networks. It involves 14 research institutes and universities in seven European countries plus Brazil, China, India and South Africa. For further information on the project INGINEUS please see www.ingineus.eu

In South Africa the Gordon Institute of Business Science is responsible for undertaking the survey on behalf of the research consortium INGINEUS.

The Gordon Institute of Business Science (see www.gibs.co.za) is fully responsible for the protection of your data. Your responses are treated with full confidentiality. Results are summarised in spreadsheets together with information collected from other enterprises in the sample. Data protection is fully guaranteed.

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- Answer by placing a cross in the relevant box, except where a written comment is needed
- Answer for your specific enterprise e.g. stand-alone firm or specific subsidiary etc.
- Answer all questions as they relate to your enterprise in 2008
- Where data for three previous years are requested, include 2006, 2007 and 2008
- The abbreviation 'MNC' is used for 'multi-national corporation' throughout the survey

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1. Please briefly describe your enterprise's main product (goods or services)

☐ 1.1 Agroprocessing

☐ 1.2 ICT

☐ 1.3 Automotive

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Main area of focus (Agriculture)

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1.1 Main areas of focus (Agroprocessing)

- ☐ 101. Processing and preserving of meat and production of meat products
- ☐ 102. Processing and preserving of fish, crustaceans and mollusks
- ☐ 103. Processing and preserving of fruit and vegetables
- ☐ 104. Manufacture of vegetable and animal oils and fats
- ☐ 105. Manufacture of dairy products
- ☐ 106. Manufacture of grain mill products, starches and starch products
- ☐ 107. Manufacture of bakery and farinaceous products
- ☐ 108. Manufacture of other food products
- ☐ 109. Manufacture of prepared animal feeds

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Main area of focus (ICT)

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1.2 Main areas of focus (ICT)

- ☐ 26.30.00 Manufacture of communication equipment
- ☐ 62.01.00 Computer programming activities (This class includes the writing, modifying, testing and supporting of software)
- ☐ 62.02.00 Computer consultancy activities
- ☐ 62.03.00 Computer facilities management activities
- ☐ 62.09.00 Other information technology and computer service activities

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Main Area of focus (Automotive)

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1.3 Main areas of focus (Automotive)

- ☐ 25241 Manufacture of technical parts and accessories of plastic
- ☐ 28408 Pressing, stamping and roll forming
- ☐ 2914 Manufacture of bearings, gears, gearing and driving elements
- ☐ 3161 Manufacture of electrical equipment for engines and vehicles
- ☐ 343 Manufacture of parts and accessories for motor vehicles and their engines
- ☐ 74205 Engineering activities for projects in specific technical fields

Other (please specify)

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2. Are you?

☐ 2.1 A standalone company?

☐ 2.2 A subsidiary of a MNC?

☐ 2.3 The headquarters of a MNC?

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3.1 How many full-time equivalent (FTE) employees does your enterprise have?

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3.2 Does your enterprise have a significant share of sales activity abroad?

☐ Yes

☐ No

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3.2.1 If you answered 'Yes' to the question above then please provide the percentage (%) of total sales derived from export.

%

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3.3 Do you have significant R&D activity?

☐ Yes

☐ No

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3.3.1 If you answered 'Yes' to the above then please estimate the number of full time equivalents employed in R&D.

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4.1 In geographical terms, is your enterprise's largest market?

☐ 4.1.1 Internal to your enterprise

☐ 4.1.2 A regional market (local region in your country)

☐ 4.1.3 Domestic market (rest of your country)

☐ 4.1.4 An export market



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4.2 If an export market (4.1.4) was selected then please indicate the 3 most important destinations in terms of sales.

☐ 4.2.1 North America

☐ 4.2.2 South America

☐ 4.2.3 Western Europe

☐ 4.2.4 Central and Eastern Europe

☐ 4.2.5 Africa

☐ 4.2.6 Japan & Australasia

☐ 4.2.7 Rest of Asia

☐ 4.2.8 Rest of the world (developing)

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☐ 5.1 We produce most technological inputs in-house☐ 5.2 We buy most of our inputs from other branches of our own MNC☐ 5.3 We buy most of our technological inputs from non-MNC firms☐ 5.4 We buy most of our inputs from MNCs with which we are not formally connected☐ 5.5 We buy most of our inputs from public-sector organizations, e.g. research institutes, universities etc.

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#7: Sources of new knowledge

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Other (please specify)

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8. Has your enterprise developed formal/informal linkages (e.g. research relationships) with the following kinds of foreign organisations?

(Informal implies no written contract or financial obligation exists)

Please tick all relevant boxes.

	Yes, Formal	Yes, Informal	No
8.1 Clients	☐	☐	☐
8.2 Suppliers	☐	☐	☐
8.3 Competitors	☐	☐	☐
8.4 Consultancy Companies	☐	☐	☐
8.5 Government	☐	☐	☐
8.6 Foreign Universities/Research Institutions/Labs	☐	☐	☐
8.7 Other	☐	☐	☐

Other (please specify)

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9.1 Regarding internationalisation, does your firm offshore (or has your firm offshored) production or any R&D activities?

(Offshoring encompasses activities both internal and external to the firm for the purposes of serving home country or global markets in a location outside the enterprise's home country)

☐ Yes

☐ No

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9.2 Complete only if 'Yes' selected in Question 9.1 above.

What were the important regional factors in the decision to offshore your enterprise's production and/or R&D innovation activities into a host region(s)? Mark all important factors.

	Offshoring of production	Offshoring of innovation
9.2.1 Availability of specialised knowledge in the host region	☐	☐
9.2.2 Availability of qualified human capital at a lower cost than in your own country	☐	☐
9.2.3 Access to knowledge infrastructure and services in the host region (R&D infrastructure, technical support services etc.)	☐	☐
9.2.4 Access to other infrastructure, cheaper production resources and services (land, inputs or unskilled labour, ICT, electricity, roads, airports, ports etc.)	☐	☐
9.2.5 Opportunity to sell existing products and achieve greater access into new markets	☐	☐
9.2.6 Incentives for the location of activities in the host region (e.g. favourable regulations, special tax regimes, testing facilities and trials etc.)	☐	☐



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9.2.7 Efficient financial markets (including Venture Capital)	☐	☐
9.2.8 The level of ethical standards and trust	☐	☐
9.2.9 The enforcement of intellectual property rights	☐	☐
9.2.10 Following clients who are outsourcing i.e. 'follow sourcing'	☐	☐
9.2.11 Other, please specify below	☐	☐
Other (please specify)		

10. Please indicate how the following functions are performed by your enterprise, including different subsidiaries of the same firm.
Please select all that apply.

	By your unit in your location	At subsidiaries of firm in a developed location(s)	At subsidiaries of firm in a developing location(s)	Outsourced to a partner in your country	Outsourced to a partner outside your country in a developed location	Outsourced to a partner outside your country in a developing location
10.1 Strategic Management	☐	☐	☐	☐	☐	☐
10.2 Product development (research, design and engineering)	☐	☐	☐	☐	☐	☐
10.3 Marketing, sales and account management	☐	☐	☐	☐	☐	☐
10.4 Operations (manufacturing, service supply)	☐	☐	☐	☐	☐	☐
10.5 Procurement, logistics, distribution (obtaining, storing and transporting inputs and outputs)	☐	☐	☐	☐	☐	☐
10.6 Corporate governance (legal, finance, accounting, government)	☐	☐	☐	☐	☐	☐
10.7 Human resource management	☐	☐	☐	☐	☐	☐
10.8 Technology and process development (maintenance, redesign of equipment)	☐	☐	☐	☐	☐	☐
10.9 Firm infrastructure (building and maintenance IT systems)	☐	☐	☐	☐	☐	☐
10.10 Customers and after sales service	☐	☐	☐	☐	☐	☐

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11. Indicate the extent to which the following factors represented a challenge or barrier when developing a new good or service in collaboration with firms, universities or other organisations located ABROAD?

Please note only one answer may be selected per row.

	Extreme Barrier	Serious Barrier	Moderate Barrier	Small Barrier	Not a barrier at all
11.1 Finding relevant new knowledge	☐	☐	☐	☐	☐
11.2 Overcoming organisational barriers and gaining management acceptance	☐	☐	☐	☐	☐
11.3 Changing the current location of operations and the associated cost thereof	☐	☐	☐	☐	☐
11.4 Managing globally dispersed projects and cultural differences	☐	☐	☐	☐	☐
11.5 Harmonising tools, structures and processes	☐	☐	☐	☐	☐

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12. During the PAST three years, how did your enterprise experience the following factors in the internationalisation of your innovation activities?

	Highly Negative	Moderately Negative	Moderately Positive	Highly Positive	Factor Not Experienced
12.1 Practical support from centres for the internationalisation of innovation and technology transfer	☐	☐	☐	☐	☐
12.2 Public incentives and economic support	☐	☐	☐	☐	☐
12.3 The international exposure and contacts of universities, public research and administrative structures	☐	☐	☐	☐	☐
12.4 Relevant labour force training and skills	☐	☐	☐	☐	☐
12.5 The regulations, practice and jurisprudence around intellectual property rights	☐	☐	☐	☐	☐
12.6 The rules and practice regarding foreign direct investment and trade policy	☐	☐	☐	☐	☐
12.7 The rules and practice regarding migration policy regulations for employing foreign scientists/technicians/experts	☐	☐	☐	☐	☐
12.8 The availability of risk capital for innovation activities with an international dimension	☐	☐	☐	☐	☐
12.9 The corporate governance environment (rules concerning firm ownership, shareholder's rights, etc.)	☐	☐	☐	☐	☐

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13. Considering your future Innovation activities, please assess the need for improving the following factors:

	Very High Need	Moderately High Need	Moderately Low Need	Very Low Need	Factor not needed
13.1 Practical support from centres for the internationalisation of innovation and technology transfer	☐	☐	☐	☐	☐
13.2 More public incentives and economic support	☐	☐	☐	☐	☐
13.3 Better access to international research networks	☐	☐	☐	☐	☐
13.4 Higher skills in the labour force	☐	☐	☐	☐	☐
13.5 More stringent regulations, practice and jurisprudence around intellectual property rights	☐	☐	☐	☐	☐
13.6 Better and clearer rules regarding foreign direct investment and trade	☐	☐	☐	☐	☐
13.7 More open and flexible migration policy regulations for employing foreign scientists/technicians/experts	☐	☐	☐	☐	☐
13.8 Greater availability of risk capital for innovation activities with an international dimension	☐	☐	☐	☐	☐



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14. How have you reacted (or are planning to react) to the current global economic crisis?
☐ 14.1 Few or no changes
☐ 14.2 Increasing efforts at innovation on your part
☐ 14.3 A serious reduction of your innovative activities
☐ 14.4 Relocation abroad of your innovative activities
☐ 14.5 Relocation of innovative activities to you from abroad

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Contact Information
Name:
Company:
Address:
Address 2:
City/Town:
State:
ZIP/Postal Code:
Country:
Email Address:
Phone Number:

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Thank you

We appreciate your time.

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6. ANNEX II: The questionnaire translated

6.1. The questionnaire in Danish

- Marker venligst det relevante felt ved hjælp af et klik med venstre museknap, undtagen hvor en skriftlig kommentar er efterspurgt
- Bemærk: forkortelsen MNS bruges gennemgående for 'multinationalt selskab'
- Svarene gælder for den specifikke virksomhed, hvad enten den er selvstændig eller et datterselskab
- Spørgsmålene bedes besvaret med henblik på virksomhedens aktiviteter i 2008. Hvor der spørges for en 3-årig periode, inkluder venligst 2006, 2007 og 2008

1. Virksomhedens produkter

1.1	Fødevarer	
1.2	Ingredienser	
1.3	Drikkevarer	
1.4	Dyrefoder	

2. Er virksomheden (markér kun 1 mulighed):

2.1	En selvstændig virksomhed?	
2.2	Datterselskab af et MNS?	
2.3	Hovedkontor for et MNS?	

3.1. Hvormange fuldtidsansatte er der i virksomheden? (vælg én af nedenstående muligheder)

3.1	Mindre end 10 ansatte	
3.2	Mellem 10 og 49 ansatte	
3.3	Mellem 50 og 249 ansatte	
3.4	Mellem 250 og 999 ansatte	
3.5	1000 eller flere ansatte	

4. Hvor er virksomhedens største marked?

4.1	Internt i virksomheden	
4.2	I nærheden - i virksomhedens hjemmeregion	
4.3	I resten af Danmark	
4.4	Vesteuropa	
4.5	Central- og Østeuropa	
4.6	Nordamerika	
4.7	Sydamerika	
4.8	Afrika	



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4.9	Japan & Australien	
4.10	Øvrige Asien	

6. Hvilken af de følgende udtalelser beskriver bedst virksomhedens samarbejdsforhold med leverandører af teknologi (f.eks. hardware, software og viden)?

6.1	Vi udvikler selv det meste af den teknologi vi har brug for.	
6.2	Vi køber det meste teknologi fra andre inden for det MNS vi er en del af.	
6.3	Vi køber det meste teknologi fra firmaer der ikke er multinationale.	
6.4	Vi køber det meste teknologi fra MNS'er som vi ikke formelt er en del af.	
6.5	Vi køber det meste teknologi fra offentlige institutioner (universiteter, forskningsinstitutioner m.v.)	

7. Angiv hvis virksomheden har gennemgået eller oplevet innovation inden for de seneste 3 år (2006-2008) i nogle af følgende former (markér gerne flere, hvis relevant)

		Nyt i hele verden	Nyt i fødevarer sektoren	Nyt i virksomheden	Ikke oplevet innovation i perioden
7.1	Nye produkter				
7.2	Nye service				
7.3	Nye eller mærkbart Forbedrede produktionsmetoder				
7.4	Nye eller mærkbart Forbedrede distributionsmetoder til jeres produkter				
7.5	Nye eller mærkbart Forbedrede støtteaktiviteter (f.eks. inden for bogholderi, salg, vedligeholdelse m.v.)				



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8. Hvem har I samarbejdet med i forbindelse med udviklingen af den vigtigste innovation (nyskabelse) for virksomheden i løbet af de seneste 3 år? Marker gerne mere end én.

		Hjemmer egionen	Danmark	North America	South America	Western Europe	Central & Eastern Europe	Africa	Japan & Australas ia	Rest of Asia
8.1	Kunder									
8.2	Underleverandører									
8.3	Konkurrenter									
8.4	Konsulent virksomheder									
8.5	Staten									
8.6	Udenlandske universiteter/forskningsinstitutio ner/laboratoriers									
8.7	Andre									

Andre (skriv venligst hvilke)

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9. Har virksomheden indgået formelle og/eller uformelle forbindelser i udlandet (i forskningsøjemed) med nogle af følgende former for institutioner? (markér gerne mere end en, hvis det er relevant)

		Ja, formelle	Ja, uformelle	Nej
9.1	Kunder			
9.2	Underleverandører			
9.3	Konkurrenter			
9.4	Konsulent virksomheder			
9.5	Regeringsinstanser			
9.6	Udenlandske universiteter/forskningsinstitutioner/laboratorier			
9.7	Andre			

Andre (skriv venligst hvilke)

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9.2. Vi vil gerne forstå hvilke regionale faktorer (uden for virksomhedens egen region) der har haft betydning for virksomhedens valg af nye geografiske lokaliteter for produktion og/eller forskning & udvikling samt andet innovation.

		Udflytning af produktion	Udflytning af innovationsprocesser
9.2.1	Adgang til specialiseret viden i værtsregionen		
9.2.2	Adgang til billigere kvalificeret arbejdskraft end i Danmark		
9.2.3	Adgang til vidensinfrastruktur og service i værtsregionen (f.eks. forskning, teknikere mv.)		
9.2.4	Adgang til andre former for infrastruktur, billigere produktion og service (jord, input eller ufaglært arbejdskraft, informationsteknologi (IT), elektricitet, veje, lufthavne, havne m.v.)		
9.2.5	Muligheden for at sælge varer og dermed få adgang til nye markeder		
9.2.6	Særlige incitamenter for at flytte aktiviteter til værtsregionen (f.eks. støtteordninger, skatteregimer, testregulering og -faciliteter m.v.)		
9.2.7	Effektive finansmarkeder (inklusiv risikovillig kapital)		
9.2.8	Niveauet for etiske standarder og tillid		
9.2.9	Andre		

Andre (skriv venligst hvilke)

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10. Hvordan er de følgende funktioner udført i virksomheden (samt i eventuelle datterselskaber)? Markér gerne mere end 1, hvis relevant.

		Af virksomheden, hjemme	Af datterselskab i andre industrialiserede lande	Af datterselskab i udviklingslande	Outsourced til Samarbejdspartner hjemme	Outsourced til samarbejdspartner i et andet industrialiseret land	Outsourced til samarbejdspartner i et udviklingsland
10.1	Strategisk Management						
10.2	Produktudvikling (forskning, design og maskinudvikling)						
10.3	Marketing, salg og regnskabsføring						
10.4	Drift (fremstilling, service)						
10.5	Køb, logistik, distribution (tilvejebringelse, lagring og transport af input og færdige produkter)						
10.6	Virksomhedsledelse (juridisk, finansiel, regnskabsmæssig, ledelsesrelationer)						
10.7	Human resource management						
10.8	Technologi og procesudvikling (vedligeholdelse, løbende design af udstyr)						
10.9	Virksomhedens infrastruktur (bygninger og vedligeholdelse af IT systemer)						
10.10	Kunder og post-salg service						



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11. Baseret på virksomhedens erfaringer: i hvor høj grad bliver følgende faktorer set som afgørende barrierer ved overvejelser omkring udvikling af nye produkter eller services i samarbejde med virksomheder, universiteter eller andre organisationer i udlandet? Markér 1 i hver række.

		ekstrem barriere	alvorlig barriere	mindre barriere	lille barriere	ikke en barriere
11.1	Adgang til relevant ny viden (fra hele kloden)					
11.2	Fastsættelse af værdien af ny viden					
11.3	Nedbryde funktionelle og organisatoriske barrierer og skabe incitamenter for samarbejde (f.eks. management buy-in)					
11.4	Virksomhedens nuværende beliggenhed og omkostningerne ved at flytte					
11.5	Udfordringer omkring styring af komplekse geografisk spredte projekter og kulturelle forskelligheder imellem lande og regioner					
11.6	Redskaber for harmonisering af strukturer og processer i virksomhedens netværk, der muliggør samarbejde					

12. I løbet af de seneste 3 år, hvor hhv. positive eller negative var følgende faktorer i internationaliseringen af virksomhedens forsknings- og innovationsaktiviteter?

		Meget negativt	Mindre negativt	Mindre positivt	Meget positivt	Hverken positivt eller negativt
12.1	Praktisk støtte fra centre som støtter internationalisering af innovation, for anvendt forskning og fra institutioner til fremme af teknologioverførsler					
12.2	Offentlige incitamenter og økonomisk støtte til internationalisering af forretningsmæssige og innovationsrelaterede kontakter					
12.3	Internationale kontakter samt fremvisninger på universiteter, forskningsinstitutioner samt praksisser for forskningssamarbejder					
12.4	Træning af arbejdskraft mhp. internationalisering af					



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		Meget negativt	Mindre negativt	Mindre positivt	Meget positivt	Hverken positivt eller negativt
	innovation					
12.5	Regulering, praksisser og implementering af immaterielle rettigheder (patenter, copyrights mv.)					
12.6	Regulering af (og praksisser omkring) udenlandske investeringer samt handelspolitik					
12.7	Regulering af (og praksisser omkring) migration, f.eks. for ansættelse af udenlandske forskere, teknikere og eksperter					
12.8	Tilstedeværelse af risikovillig kapital til innovationsaktiviteter med internationale dimensioner					
12.9	Regler for virksomhedens ledelsesstruktur (ejerskab, aktieejeres rettigheder m.v.)					

13. FREMTIDEN: Hvordan vil følgende faktorer påvirke virksomhedens innovationsaktiviteter i fremtiden? Markér hvilke af følgende faktorer der i dine øjne bør forbedres:

		Stort behov	Mellem behov	Lille behov	Ikke vigtigt
13.1	Bedre støttemuligheder fra forskningscentre og institutioner til fremme for teknologioverførsler				
13.2	Flere offentligt støttede incitamenter og mere økonomisk støtte til internationalisering af forretningsmæssige og innovationsrelaterede kontakter				
13.3	Bedre adgang til internationale forskningsnetværk				
13.4	Bedre træning af arbejdskraft				
13.5	Strammere regulering, praksisser og implementering af immaterielle rettigheder (patenter, copyrights m.v.)				
13.6	Bedre og klarere regler omkring udenlandske investeringer og handelspolitik				
13.7	En mere åben og fleksibel migrationspolitik for ansættelse af udenlandske forskere, teknikere og eksperter				
13.8	Bedre adgang til risikovillig kapital til innovationsaktiviteter med internationale dimensioner				



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14. I forbindelse med finanskrisen, hvilket af nedenstående konsekvenser tror du denne vil have for virksomhedens innovative aktiviteter i den nærmest fremtid?

14.1	Meget få eller ingen ændringer	
14.2	Større satsning inden for innovation i virksomheden	
14.3	En alvorlig nedgang i virksomhedens innovationsrelaterede aktiviteter	
14.4	Udflytning af innovationsrelaterede aktiviteter til udlandet	
14.5	Hjemflytning af tidligere udflyttede innovationsrelaterede aktiviteter tilbage til Danmark	



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6.2. The questionnaire in German

- Kreuzen Sie bitte die jeweils zutreffende Antwortmöglichkeit in den dafür vorgesehenen Kästchen an [x], wenn nicht ein Text erbeten wird
- Beachten Sie bitte, dass die Abkürzung MNU für “Multinationales Unternehmen” im ganzen Fragebogen verwendet wird
- Antworten Sie bitte nur für dieses Unternehmen, z.B. ein Einzelunternehmen oder eine Tochter
- Beantworten Sie bitte alle Fragen, soweit sie für Ihr Unternehmen zum Jahr 2008 zutreffen
- Wenn nach Daten zu den drei vorhergehenden Jahren gefragt wird, sind die Jahre 2006, 2007 und 2008 gemeint

1. Beschreiben Sie bitte kurz das Hauptprodukt Ihres Unternehmens (Gut oder Dienstleistung)

1.1	Verarbeitung landwirtschaftlicher Produkte	
1.2	Informations- und Kommunikationstechnologien	
1.3	Automobilindustrie	

2. Sind Sie (nur einmal ankreuzen):

2.1	ein selbständiges Unternehmen?	
2.2	Tochter eines MNU?	
2.3	Hauptverwaltung eines MNU?	

3. Wieviele Beschäftigte (Vollzeit-Äquivalente) hat Ihr Unternehmen?

3.1	Fewer than 10 FTE employees	
3.2	10 to 49 employees	
3.3	50 to 249 employees	
3.4	250 to 999 employees	
3.5	1000 or more employees	

4. Wo ist der größte geographische Markt für Ihr Unternehmen?

4.1	im eigenen Konzern oder der eigenen Gruppe	
4.2	lokal/regional in Deutschland (ca. 50 km Umkreis)	
4.3	national (gesamtes Bundesgebiet)	
4.4	Nordamerika	
4.5	Südamerika	
4.6	Westeuropa	
4.7	Osteuropa	
4.8	Afrika	
4.9	Japan und Australasien	
4.10	andere Länder Asiens	



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6. Welcher der folgenden Sätze beschreibt am besten die Quelle der Technologie-Inputs (Hardware, Software, Wissen) Ihres Unternehmens?

6.1	Wir entwickeln die meisten technologischen Inputs im eigenen Haus	
6.2	Wir erwerben die meisten Inputs von anderen Bereichen unseres MNU	
6.3	Wir erwerben die meisten Inputs von Unternehmen, die keine MNUs sind	
6.4	Wir erwerben die meisten Inputs von MNU, mit denen wir nicht formell verbunden sind	
6.5	Wir erwerben die meisten unserer Inputs von öffentlichen Einrichtungen wie z.B. Forschungsinstituten, Universitäten etc.	

7. Kreuzen Sie bitte an, in welchen Bereichen Ihr Unternehmen in den drei vergangenen Jahren (2006-2008) Innovationen durchgeführt hat (Mehrfach-Antwort möglich).

		neu auf dem Weltmarkt	neu für Ihre Branche	neu für Ihr Unternehmen	keines von ihnen
7.1	Neue Güter				
7.2	Neue Dienstleistungen				
7.3	Neue oder signifikant verbesserte Fertigungs- oder Geschäftsprozesse				
7.4	Neue oder signifikant verbesserte Methoden in Logistik, Vertrieb und Auslieferung für Ihre inputs, Güter oder Dienstleistungen				
7.5	Neue oder signifikant verbesserte Methoden in unterstützenden Geschäftsprozessen (z. B. Einkauf, Buchführung, Instandhaltung, etc.)				



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- 8. Mit wem haben Sie bei der Entwicklung der wichtigsten Innovationen Ihres Unternehmens in den drei letzten Jahren aktiv zusammengearbeitet?
Bitte kreuzen Sie alles Zutreffende an.**

		Standortregion in Deutschland	national	Nordamerika	Südamerika	Westeuropa	Osteuropa	Afrika	Japan und Australasien	andere Länder Asiens
8.1	Kunden									
8.2	Zulieferer									
8.3	Mitbewerber									
8.4	Beratungsunternehmen									
8.5	Regierung, Behörden									
8.6										
8.7	Ausländische Universitäten/Forschungseinrichtungen									
8.8	Andere, bitte nennen									

Andere (bitte nennen)

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9. Welche regionalen Faktoren des oder der Gastländer, in denen Sie einen Standort haben, waren für die Entscheidung bedeutend, Produktion und/oder FuE und Innovationsaktivitäten dorthin zu verlagern? Bitte kreuzen Sie alles Zutreffende an.

		Verlagerung von Produktion	Verlagerung von Innovationsakti- vitäten
9.1	Verfügbarkeit von speziellem Wissen im Gastland		
9.2	Verfügbarkeit von qualifizierten Arbeitskräften zu niedrigeren Lohnkosten als im eigenen Land		
9.3	Zugang zu Wissensinfrastruktur und Dienstleistungen im Gastland (FuE-Infrastruktur, Technische Dienste etc.)		
9.4	Zugang zu anderer Infrastruktur, kostengünstige Produktionsbedingungen (Grundstück, Inputs, gering qualifizierte Arbeitskräfte, Informations- und Kommunikationstechnologien, Elektrizität, Straßen, Flughäfen, Häfen etc.)		
9.5	Absatzchancen für bestehende Produkte und besserer Zugang zu neuen Märkten		
9.6	Investitionsanreize im Gastland (z. B. günstige Regulierungen, vorteilhafte Steuerregeln, Test-Möglichkeiten und Erprobung)		
9.7	Effiziente Finanzmärkte (einschl. Venture capital)		
9.8	Niveau von ethischen Standards und Vertrauensbeziehungen		
9.9	Andere, bitte nennen		

Andere (bitte nennen)

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10. Bitte beschreiben Sie, wo die folgenden Funktionen in Ihrem Unternehmen ausgeführt werden (einschließlich der Zweigbetriebe Ihres Unternehmens). Bitte kreuzen Sie alles Zutreffende an.

		Am eigenen Standort	In Zweigbetrieben in entwickelten Ländern	In Zweigbetrieben in Entwicklungsländern	An einen nationalen Partner ausgelagert	An einen ausländischen Partner in einem entwickelten Land ausgelagert	An einen ausländischen Partner in einem Entwicklungsland ausgelagert
10.1	Strategisches Management						
10.2	Produktentwicklung (Forschung, Entwicklung und Technische Umsetzung)						
10.3	Marketing, Verkauf und Rechnungslegung						
10.4	Leistungserstellung (Produktion, Dienstleistungen)						
10.5	Beschaffung, Logistik, Vertrieb (Erwerb, Lagerung und Transport von Inputs und Outputs)						
10.6	Unternehmensführung (Rechtsangelegenheiten, Finanz, Buchhaltung, Behörden-Kontakte)						
10.7	Human resource management						
10.8	Technische Prozess-Entwicklung (Instandhaltung, Änderung der Produktionseinrichtungen)						
10.9	Unternehmens-Infrastruktur (Gebäude, IT-Management)						
10.10	Kundenbeziehungen und After-Sales-Service						



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6.3. The questionnaire in Portuguese

- Responda marcando a caixa correspondente, exceto onde um comentário por escrito for necessário
- NOTA: a sigla MNC se refere a uma corporação multinacional ao longo de todo questionário
- Responda as questões para a sua empresa especificamente, por exemplo, unidade independente (stand-alone) ou subsidiária, etc
- Responda todas as questões considerando o ano de 2008 como referência
- Quando informações sobre anos anteriores forem necessárias, incluir 2006, 2007 e 2008

1. Escolha o setor que melhor descreve o principal produto (bem ou serviço) da sua empresa.

1.1	Agroprocessamento	
1.2	Tecnologia da Informação e Comunicação (ICT)	
1.3	Automotivo	

2. Sua empresa é (selecione apenas uma opção):

2.1	Uma unidade isolada (standalone)?	
2.2	Uma subsidiária de uma MNC?	
2.3	A sede de uma MNC?	

3.1. Quantos trabalhadores em tempo integral tem a sua empresa?

3.1	Menos do que 10	
3.2	De 10 a 49	
3.3	De 50 a 249	
3.4	De 250 a 999	
3.5	1000 ou mais	

4. Em termos geográficos, qual é o mercado mais relevante da sua empresa?

4.1	Dentro da sua corporação	
4.2	Sua região local (seu estado)	
4.3	O resto do país	
4.4	América do Norte	
4.5	América do Sul	
4.6	Europa Ocidental	
4.7	Europa Central e Oriental	
4.8	África	
4.9	Japão & Oceania	



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4.10	Resto da Ásia	
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6. Qual opção abaixo melhor descreve a relação de sua empresa com fornecedores de tecnologia (hardware, software e conhecimento)?

6.1	Nós produzimos a maior parte dos nossos insumos tecnológicos	
6.2	Nós adquirimos a maior parte dos nossos insumos tecnológicos de outras subsidiárias da nossa própria MNC	
6.3	Nós adquirimos a maior parte dos nossos insumos tecnológicos de firmas locais (não-MNC)	
6.4	Nós adquirimos a maior parte dos nossos insumos tecnológicos de MNCs com as quais não temos vínculo formal	
6.5	Nós adquirimos a maior parte dos nossos insumos tecnológicos de organizações do setor público, por exemplo, institutos de pesquisa, universidades, etc.	

7. Por favor indique se a sua empresa inovou nos últimos 3 anos (2006-2008) em qualquer das opções abaixo. Você pode marcar mais do que uma opção.

		Para o mundo	Para o setor	Para a firma	Nenhum
7.1	Novos produtos				
7.2	Novos serviços				
7.3	Novos (ou significativamente melhores) métodos de produção ou manufatura				
7.4	Novo (ou significativamente melhores) logística ou métodos de distribuição ou entrega de insumos, bens ou serviços				
7.5	Novas (ou significativamente melhores) atividades de suporte aos seus processos (ex: compras, contabilidade, sistemas de manutenção, etc.				



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8. Com quais instituições você colaborou ativamente no desenvolvimento da inovação mais importante da sua firma nos últimos 3 anos? Selecionar todas as opções relevantes. Nota: O termo região se refere ao nível sub-nacional (ex: estado).

		Sua Região	Seu País	América do Norte	América do Sul	Europa Ocidental	Europa Central e Oriental	Japão & Oceania	Resto da Ásia
8.1	Clientes								
8.2	Fornecedores								
8.3	Competidores								
8.4	Empresas de consultoria								
8.5	Governo								
8.6	Universidades estrangeiras/ instituições de pesquisa/ laboratórios								
8.7	Outros								



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9. A sua empresa desenvolveu ligações formais (ex: relações de pesquisa) com alguma das seguintes instituições estrangeiras?

Marque todas as opções relevantes.

		Sim, ligação formal	Sim, ligação informal	Não
9.1	Clientes			
9.2	Fornecedores			
9.3	Competidores			
9.4	Empresas de consultoria			
9.5	Governo			
9.6	Universidades/ instituições de pesquisa/ laboratórios			
9.7	Outros			

Outros (especificar)

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9.2. Nós queremos entender quais características da região sede (host region) para a qual a sua empresa se moveu foram importantes na decisão de (offshore) produção e/ou P&D e atividades inovativas. Marcar todos os fatores que considerar importantes.

		Offshoring de produção	Offshoring de inovação
9.2.1	Disponibilidade de conhecimento especializado na região sede (host region)		
9.2.2	Disponibilidade de capital humano a um custo mais baixo do que em seu próprio país		
9.2.3	Acesso à infraestrutura de conhecimento e serviços na região sede (infraestrutura de P&D, serviços de suporte técnico, etc.)		
9.2.4	Acesso a outro tipo de infraestrutura, fatores e serviços produtivos com custo mais baixo (terra, insumos ou trabalho não qualificado, ICT, eletricidade, autoestradas, aeroportos, etc.)		
9.2.5	Oportunidade de vender produtos existentes e conseguir maior acesso a novos mercados		
9.2.6	Incentivos para instalação de atividades na região sede (ex: regulação favorável, tributação especial, instalações de testes, etc.)		
9.2.7	Mercado financeiro mais eficiente (incluindo Capital de Risco)		
9.2.8	O nível de padrões éticos e de credibilidade		
9.2.9	Outros		

Outros (especificar)

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10. Favor indicar qual das seguintes funções são executadas pela sua empresa (incluindo outras subsidiárias da mesma empresa). Marcar todas que se aplicam.

		Na sua unidade no seu país	Em uma firma subsidiária em uma região desenvolvida	Em uma firma subsidiária em uma região em desenvolvimento	Parceiro terceirizado em seu país	Parceiro terceirizado em um país desenvolvido	Parceiro terceirizado em um país em desenvolvimento
10.1	Gerência estratégica						
10.2	Desenvolvimento de produtos (pesquisa, design e engenharia)						
10.3	Marketing, vendas e gerência de contas (account management)						
10.4	Operações (manufatura, fornecimento de serviços)						
10.5	Compras (procurement), logística, distribuição (compra, estoque e transporte de insumos e produtos)						
10.6	Governança corporativa (legal, financeira, contabilidade, relações com o governo)						
10.7	Gerência de recursos humanos.						
10.8	Desenvolvimento de tecnologia e de processos (manutenção, redesign de equipamentos)						
10.9	Infraestrutura (instalações e manutenção de sistemas de IT)						
10.10	Serviço a consumidores e pós-venda						



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11. Baseado na sua própria experiência, indique em que medida cada um dos fatores a seguir representa um desafio ou uma barreira quando você considera desenvolver um novo produto ou processo em colaboração com outra firma, universidade ou outra organização localizada no exterior. Marque uma opção em cada linha.

		Barreira extrema	Barreira grande	Barreira moderada	Barreira pequena	Não é uma barreira
11.1	Encontrar novos conhecimentos relevantes no mundo					
11.2	Avaliar o valor de novos conhecimentos					
11.3	Desfazer barreiras institucionais e funcionais e ter os incentivos necessários para colaboração (ex: management buy-in)					
11.4	A localização atual das operações e o custo de mudar essa configuração.					
11.5	Gerenciar a complexidade de projetos globalmente dispersos e diferenças culturais entre nações e regiões					
11.6	Harmonizar ferramentas, estruturas e processos na rede (network) para permitir colaboração e re-uso					

12. Durante os últimos três anos, quão positivas ou negativas foram os seguintes fatores no processo de globalização/internacionalização das suas atividades de inovação?

		Muito Negativa	Moderadamente Negativa	Moderadamente Positiva	Muito Positiva	Experiência Inexistente
12.1	Suporte prático de centros de apoio à internacionalização da inovação, de ciências aplicadas / serviços de tecnologia industrial e de organizações de transferência de tecnologia					
12.2	Incentivos públicos e suporte econômico disponível para internacionalizar contatos de negócios e de inovação					



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		Muito Negativa	Moderadam ente Negativa	Moderadam ente Positiva	Muito Positiva	Experiência Inexistente
12.3	Os contatos e a exposição internacional de universidades, pesquisa pública e universitária, práticas administrativas e regulação de colaboração de pesquisas					
12.4	Força de trabalho específica para as necessidades de internacionalização da inovação					
12.5	As regulamentações, práticas e jurisprudências relacionadas aos direitos de propriedade					
12.6	Regras e práticas relacionados ao investimento direto estrangeiro e à política comercial					
12.7	Regras e práticas ligadas à políticas de migração para o emprego de cientistas/ técnicos/ especialistas estrangeiros					
12.8	Disponibilidade de capital de risco para atividades inovativas com uma dimensão internacional					
12.9	O ambiente de governança corporativa (regras relacionadas a propriedade das firmas, direitos dos acionistas, etc.)					

13. Considerando suas atividades inovativas FUTURAS, favor indicar em que medida você vê a necessidade de melhorar os seguintes fatores:

		Necessidade Grande	Necessidade Moderada	Necessidade Pequena	Fator Irrelevante
13.1	Melhor apoio de centros de ciências aplicadas/ serviços de tecnologia industrial e organizações de transferência de tecnologia				
13.2	Mais incentivos públicos e suporte econômico disponível para a internacionalização de contatos relacionados a negócios (e inovação)				
13.3	Melhor acesso a redes internacionais				
13.4	Melhor qualificação da força de trabalho				



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13.5	Regulação, prática e jurisprudência mais rígidas relacionadas a propriedade intelectual				
13.6	Regras relacionadas à política de investimento direto estrangeiro melhor e mais claras				
13.7	Políticas de migração mais abertas e flexíveis para empregar cientistas/ técnicos/ especialistas				
13.8	Maior disponibilidade de capital de risco para atividades inovativas que possuam uma dimensão internacional				



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- 14. Em relação à crise internacional atual, favor indicar qual das consequências listadas abaixo você espera afetar a organização e o nível da sua própria atividade inovativa em um futuro próximo.**

14.1	Pouca ou nenhuma mudança	
14.2	Esforço crescente de inovação da sua parte	
14.3	Uma redução importante das suas atividades inovativas	
14.4	Relocalização da sua atividade inovativa para o exterior	
14.5	Relocalização da atividade inovativa do exterior para a sua unidade	



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6.4. The questionnaire in Chinese

- 除了明确说明需要填写的意见外，您只需要把您的选择在对应的框中画×
- 回答问卷中所有的问题，均以贵公司2008年状况为基准
- 问卷中提到过去三年数据，特指贵公司2006年、2007年和2008年的数据

1. 贵公司所在行业

1.1	农副产品加工业	
1.2	通讯设备、计算机及其他电子设备制造业	
1.3	汽车制造业	

1.1. 所处子行业（农副产品加工业）

1.1.1	131 谷物磨制	
1.1.2	132 饲料加工	
1.1.3	133 植物油加工	
1.1.4	134 制糖	
1.1.5	135 屠宰及肉类加工	
1.1.6	136 水产品加工	
1.1.7	137 蔬菜、水果和坚果加工	
1.1.8	139 其他农副食品加工	

1.2. 所处子行业（通讯设备、计算机及其他电子设备制造业）

1.2.1	4011 通信传输设备制造	
1.2.2	4012 通信交换设备制造	
1.2.3	4013 通信终端设备制造	
1.2.4	4014 移动通信及终端设备制造	
1.2.5	4041 计算机整机制造	
1.2.6	4042 计算机网络设备制造	
1.2.7	4043 电子计算机外部设备制造	
1.2.8	4071 家用影视设备制造	

1.3. 所处子行业（汽车制造业）

1.3.1	3721 汽车整车制造	
1.3.2	372501 汽车部件：离合器总成、变速器总成、传动轴总成、分动器总成、前桥总成、后桥总成、中桥总成、差速器总成、主减速器总成、前后悬挂弹簧总成等	
1.3.3	372502 汽车零件：保险杠、制动器、变速箱、车轴、车轮、减震器、散热器、消声器、排气管、离合器、方向盘、转向柱及转向器等	
1.3.4	3991 汽车用照明器具的制造	



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1.3.5	4122 汽车用仪器、仪表的制造	
1.3.6	2911 汽车用轮胎制造	

2. 贵公司属于：（只能选择一个）

2.1	不隶属于任何跨国公司的独立化公司	
2.2	跨国公司的下属公司	
2.3	跨国公司总部	

3. 贵公司全职员工人数

3.1	小于10人	
3.2	10-49人	
3.3	50-249人	
3.4	250-999人	
3.5	1000人以上（包括1000人）	

4. 目前贵公司最大的销售市场在哪里？

4.1	集团公司其他下属企业	
4.2	公司所在地市场	
4.3	全国市场	
4.4	北美	
4.5	南美	
4.6	西欧	
4.7	中东欧	
4.8	非洲	
4.9	日本和澳大利亚	
4.10	除日本和中国以外的其它亚洲国家	

5. 下列哪种说法最能说明贵公司的技术来源？

5.1	贵公司通过本企业内部研发获取所需要的大多数技术	
5.2	贵公司从所属跨国公司其他下属企业购买所需要的大多数技术	
5.3	贵公司从非跨国公司购买大多数的技术	
5.4	贵公司从没有建立正式关系的跨国公司购买大多数技术	
5.5	贵公司从研究机构 and 高校购买大多数技术	

6. 请评价过去三年（2006-2008）贵公司的创新种类和程度？（您可以选择一个以上的选项）

		全球最新	国家最新	企业最新	没有
6.1	新产品				



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6.2	新服务				
6.3	制造工艺上全新或显著的改进				
6.4	物流、分销和配送方法上全新或显著的改进				
6.5	采购、财务和保障等支撑活动流程上全新或显著的改进				

7. 过去3年（2006-2008），下列哪些组织是贵公司发展最重要创新活动的积极合作对象？

（请按照贵公司市场区域分别回答）

		企业所在的地 区	企业所在的国家	北美	南美	西欧	中东 欧	非洲	日本和澳 大利亚	除日本和 中国以外的 亚洲国家
7.1	客户									
7.2	供应商									
7.3	竞争者									
7.4	咨询公司									
7.5	政府									
7.6	国外大学、研究机构和实验室									
7.7	其他									

其他（请说明）：_____

8. 贵公司是否与国外下列组织建立起正式或者非正式的研发关系？

		正式的关系	非正式的关系	没有关系
8.1	客户			
8.2	供应商			
8.3	竞争者			
8.4	咨询公司			
8.5	政府			
8.6	国外大学、研究机构和实验室			
8.7	其他			

其他（请说明）：_____

9. 下列哪些因素在贵公司决定向海外转移生产、研发和创新活动过程中具有重要的影响？（请您选择的重要影响因素所对应的框中画X）

		生产外包	创新外包
9.1	有利于贵公司从东道国较容易地寻找所需要特定知识		
9.2	东道国具有低成本高素质人力资本		
9.3	东道国具有良好的研发基础设施和技术支持服务水平		
9.4	东道国具有廉价的生产资源和服务		
9.5	有利于贵公司现有产品能够进入东道国这样的新市场		
9.6	东道国在有关法规、税收等方面对外资的优惠政策		
9.7	东道国具有高效率金融市场（包括风险投资）		
9.8	东道国具有良好的道德标准和信用体制		



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9.9	其他		
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其他（请说明）：_____

10. 请说明贵公司的国外分支机构及外包合作伙伴各自执行哪些管理职能？

（请在所适合的框中画X）

		本公司	本公司 派驻发 达国家 的分支 机构	本公司 派驻发 展中国 家的分 支机构	本公司 所在国 家的外 包合作 公司	发达国 家外包 合作伙 伴	发展中 国外包 合作伙 伴
10.1	战略管理						
10.2	产品开发						
10.3	营销、销售和账户管理						
10.4	生产和供应链的运营管理						
10.5	采购、物流和分销						
10.6	公司的法律，财务，会计，政府关系等事务						
10.7	人力资源管理						
10.8	技术和工艺的开发（维修，重新设计的设备）						
10.9	建设和维护IT系统						
10.10	客户和售后服务						

11. 就贵公司与国外的公司、大学和其他组织合作从事研发和创新活动而言，挑战和阻碍因素的程度如何？

		很困难	较困难	一般	较容易	很容易
11.1	在全球范围内发现相关的新知识					
11.2	评估新知识的价值					
11.3	打破职能和组织上的障碍，并给与合作必要的奖励（例如管理层收购）					
11.4	企业当前的运营地点以及改变现有状态的成本					
11.5	管理分散在不同国家项目以及文化差异所带来的复杂性					
11.6	遍及整个网络的、有利于合作创新的协调工具、结构和流程					

12. 就过去三年（2006-2008）影响贵公司从事全球化创新活动而言，积极或消极因素的程度如何？

		很消极	较消极	一般	较积极	很积极
12.1	企业从应用科学/工业技术服务和技术转让机构所获得的实际					



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	支持					
12.2	为国际业务和创新相关的合作提供公开奖励和经济支持					
12.3	与国外大学和公共研究机构合作研究的过程中，形成固有的行政惯例和法规					
12.4	国际化创新所需要的人力资源培训					
12.5	知识产权的规定，惯例和判例					
12.6	外国直接投资和贸易政策的规定					
12.7	雇用外国科学家/技术员/专家的移民政策法规					
12.8	用于国际化创新活动的风险资本可得性					
12.9	企业有关公司所有权，股东的权利等一系列规则					

13. 考虑到贵公司未来的创新活动，请说明您希望看到下列因素需要改进的程度

		极需要	很需要	一般需要	不需要
13.1	更好地从应用科学/工业技术服务和技术转让机构获得支持				
13.2	更多从国际业务和创新相关的合作获得公开的奖励和经济支持				
13.3	更好地利用国际创新网络				
13.4	较高技能的劳动力队伍				
13.5	围绕知识产权更严格的法规，惯例和判例				
13.6	对外国直接投资和贸易政策更好和更明确的规定				
13.7	雇用外国科学家/技术员/专家更为开放和灵活的移民政策法规				
13.8	为国际化的创新活动提供更多的风险资本				

14. 目前的全球经济危机对公司未来的创新活动是否产生影响？

14.1	很小或者没有影响	
14.2	逐渐增加创新活动	
14.3	严重减少了创新活动	
14.4	重新调整海外的创新活动	
14.5	从海外撤回创新活动	

15. 联系信息

贵公司名称： 您的电子邮件地址：



7. ANNEX III

7.1. Introductory letter for Survey Monkey e-mail distribution

Subject: survey on _____

Dear Madam/Dear Sir

The [*insert institute name*] is presently coordinating a research project on Global Innovation Networks. The project called ENGINEUS is conducted in collaboration with partner institutions located in 11 countries.

The purpose of the project is to understand the new geography of innovation activities worldwide, that is, where are firms locating their innovation activities and who are they collaborating with in the development of new products and processes. The ultimate aim of the project is to inform policy on enhancing innovation and competitiveness.

By completing this online survey you will make a valuable contribution to this area of research. This, in turn, influences the design of effective and relevant policies affecting your business operating environment. It is only 6 pages long and it will take you no more than 15-20 minutes to complete. Your time is greatly appreciated.

Once the data from all the global partners has been assimilated, our project team will provide you with an industry report highlighting the performance of your company plotted against the national and global average obtained for each of the questions. This highly current report will be useful in benchmarking your firm against your competitors, the industry average in [*insert country*] and of the industry worldwide.

Here is a link to the survey:

(A link will be automatically inserted)

This link is uniquely tied to this survey and your email address. Please do not forward this message. If you would like to send this survey to a work colleague kindly mail us on [*insert e-mail address*] and we will forward a link to the intended recipient.

Thank you for your kind collaboration.

Best regards

[Your contact details]



7.2. Cover letter to solicit no-respondents

Dear Sir/Madam,

Your company has been selected to participate in a short web based questionnaire survey in the [automotive/ ICT/ agro-processing] industry in [country]. The overall purpose of the study is to increase the knowledge about where [nationality] firms locate their production and their main global partners.

We who contact you are working at [institution] and we are grateful for your time and effort in responding to the questions in our survey. Your participation helps us to create problem oriented and policy relevant knowledge about the effects and consequences of globalization in [country] and within the European Union. The survey consists of few pages and the questions are constructed in such a way that it will be easy to participate. It takes about 15 minutes to complete the survey. The language chosen to perform the survey is English since the project involves different countries.

You can access the web based questionnaire survey by clicking on the following link:<http://www.surveymonkey.com/s.aspx>

If we will be able to make reliable conclusions it is of importance that you respond to all questions in the survey. It is also very important that we get your response and for this reason we ask you to complete the survey as soon as possible. We also want to emphasize that your response will be treated strict confidentially and that no one will be able to connect your answers to your identity. No individual responses will be connected to individual firms in any reports based on the survey.

If you have any questions about the project or the web based questionnaire survey you are welcome to contact us by e-mail (please see information below). If you think we have contacted the wrong person in your company to take part to the survey we would also appreciate if you could redirect us to the right contact as soon as possible.

We think it is very important that the results from our study will be disseminated to you who participate in the survey. By participating in our survey you will have the opportunity to receive an executive summary of the result where you can compare your company with the average in the [automotive/ ICT/ agro-processing] industry.

We want to thank you for your kind participation in our study!

Best regards,

[Your contact details]

Please note: if you do not wish to receive further emails from us, please click the link below, and you will be automatically removed from our mailing list.
<http://www.surveymonkey.com/optout.aspx>



7.3. Reminder for no-respondents

Dear Sir/Madam,

Your company has been selected to participate in a short web based questionnaire survey in the [automotive/ ICT/ agro-processing] in [country]. The overall purpose of the study is to increase the knowledge about where [nationality] firms locate their production and their main global partners.

We who contact you are working at [name institution] and we are grateful for your time and effort in responding to the questions in our survey. Your participation helps us to create problem oriented and policy relevant knowledge about the effects and consequences of globalization in [country] and within the European Union. The survey consists of few pages and the questions are constructed in such a way that it will be easy to participate. It takes about 15 minutes to complete the survey. The language chosen to perform the survey is English since the project involves different countries.

We sent a first email in [month] inviting you to participate in the survey. We are aware that such period is usually very busy and that you could not spend the time that the questionnaire required. We would be very grateful if you could do it now. You can access the web based questionnaire survey by clicking on the following link: [SurveyLink]

If we will be able to make reliable conclusions it is of importance that you respond to all questions in the survey. It is also very important that we get your response and for this reason we ask you to complete the survey as soon as possible. We also want to emphasize that your response will be treated strict confidentially and that no one will be able to connect your answers to your identity. No individual responses will be connected to individual firms in any reports based on the survey

If you have any questions about the project or the web based questionnaire survey you are welcome to contact us by e-mail (please see information below). If you think we have contacted the wrong person in your company to take part to the survey we would also appreciate if you could redirect us to the right contact as soon as possible.

We think it is very important that the results from our study will be disseminated to you who participate in the survey. By participating in our survey you will have the opportunity to receive an executive summary of the result where you can compare your company with the average in the [automotive/ ICT/ agro-processing] industry.

We want to thank you for your kind participation in our study!

Best regards,

[Your contact details]



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7.4. Reminder for partial respondents

Dear Sir/Madam,

As you know, your company has been selected to participate in a short web based questionnaire survey in the [automotive/ ICT/ agro-processing] industry in [country]. The overall purpose of the study is to increase the knowledge about where [nationality] firms locate their production and their main global partners.

From our records, we have seen that you started to fill in the questionnaire but that you experienced some difficulties finishing it. If we will be able to make reliable conclusions it is of importance that you respond to **all** questions in the survey. For this reason, we would like to kindly ask you to complete the questionnaire.

You can access the web based questionnaire survey by clicking on the following link: [SurveyLink] and complete the few remaining questions that are still left to answer. Please remember to press the “Done” option at the end of the survey.

We also want to emphasize that your response will be treated strict confidentially and that no one will be able to connect your answers to your identity. No individual responses will be connected to individual firms in any reports based on the survey

If you have any questions about the project or the web based questionnaire survey you are welcome to contact us by e-mail (please see information below). If you think we have contacted the wrong person in your company to take part to the survey we would also appreciate if you could redirect us to the right contact as soon as possible.

We think it is very important that the results from our study will be disseminated to you who participate in the survey. By participating in our survey you will have the opportunity to receive an executive summary of the result where you can compare your company with the average in [automotive/ ICT/ agro-processing] industry.

We want to thank you for your kind participation in our study!

Best regards,

[Your contact details]